



What has been learned from restructuring processes?

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In the Spring of 2000, the CMSM *Forum* published the first article on restructuring men's religious communities. Three provincials who were engaged in or recently completed the process shared their experience and opinions about restructuring. In the past nine years many religious communities have embarked on the same path. After facilitating seven restructuring processes, I used the opportunity of my doctoral dissertation to explore the topic, "What makes the restructuring of Men's Religious Provinces successful?" This qualitative study of eight restructured religious communities analyzes and assesses the various activities and functions that go into a restructuring process, as well as the possible results of such a process.

The Research

With the assistance of CMSM and prior clients, eight congregations were identified that had completed the merger process or were well on their way towards restructuring. The congregations were all in North America. They involved the bringing together of anywhere from two to four provinces into a new province entity. The provinces shared the same charism. Some had been parts of the same province forty plus years ago and split. Others were founded by different European provinces here in the U.S. The congregations that were part of the study agreed to share archival materials on the restructuring process and identified members in their organizations for interviews. These interviews included members from the different original provinces and past leadership, as well as current leadership and those who may have been on a restructuring committee. The researcher also attended at least one province assembly/meeting for all but one of the cases.

The interviews began with a protocol inquiring into the purpose, motivation and story that led to the decision to restructure. Interviewees were asked to draw a time line of key events, turning points and highs and lows of the process. Their personal awareness and feelings

experienced during the restructuring process were noted. They were asked to outline specific processes and events. Each was also asked about the result of the merger/restructuring—in their opinion what their organization gained or lost. Finally, they were asked if the intended purpose of the restructuring was accomplished. Did the stated reasons for entering into a restructuring process match the outcome?

As in all qualitative studies the interviews were transcribed and coded by two researchers. The results were analyzed within each case and then across the eight cases to identify categories relevant to the process and results of restructuring. This comparative case study identified four main categories and numerous sub-categories of events, processes and attitudes that are part and parcel of the restructuring process.

Overview of results

Three factors emerged from the research regarding successful restructuring processes. First, the restructuring had to be based on a “mission-driven purpose,” a vision commonly held by all parties for a preferred future. Even when the restructuring was imposed from international leadership, focusing on a compelling reason for restructuring made a significant difference in the process. Those who focused primarily on pragmatic reorganization in the absence of a commonly held purpose/vision were unhappy with the results and therefore less successful.

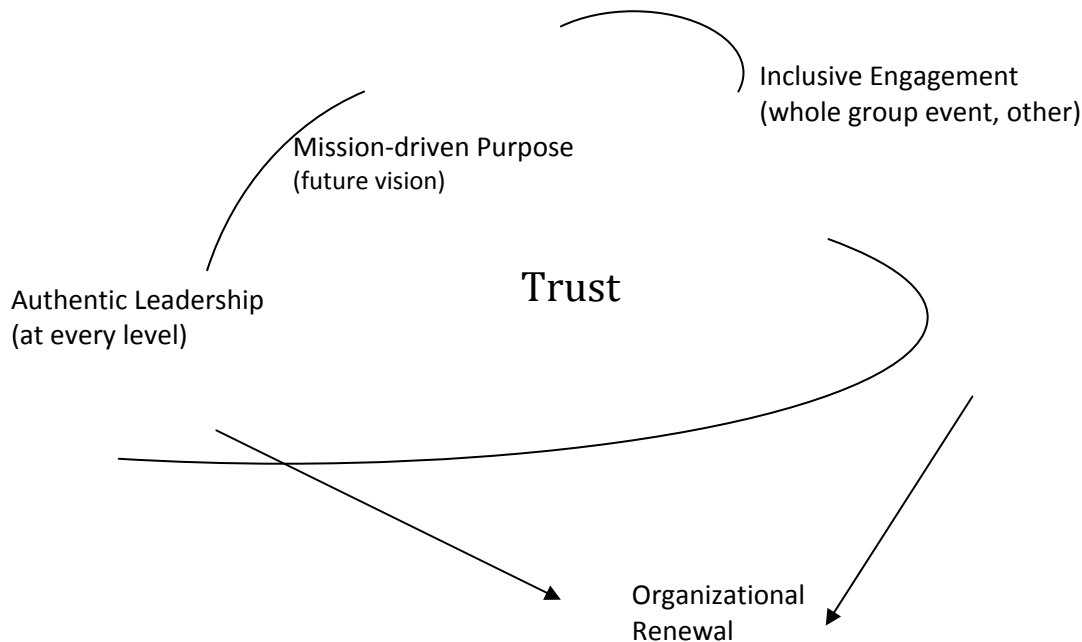
Secondly, leadership involvement impacted the restructuring process. Inter-provincial leadership and past leaders, as well as restructuring committees, influenced the outcome in positive and negative ways. When leaders acted “authentically,” focusing on the future of the congregation in line with their common vision, they modeled hope, renewal and excitement. When leadership forced the issue, failed to manage conflict or enable capable members to facilitate the process the provinces became “stuck.”

Lastly, “inclusive engagement” of all the members was essential. The more successful communities engaged their members a number of times throughout the process. These encounters built relationships by engaging the members in conversations of shared values and vision. The use of prayer and ritual built common bonds. Information was shared transparently easing suspicion and rumors. Cultural differences were addressed, often humorously lessening the fear of change. Through these whole group events members began to see themselves as one.

These three areas when accomplished well, built a growing trust among the different organizations that convinced them not only to risk but perceive the possibility of a congregational renewal through the restructuring process. Some in fact testified to a sort of congregational conversion. This was explained as a re-appropriation of their charism for a new time and in a new way for the US or North America. Members felt free to risk trying new ministries in different geographic areas. Some who had been perceived as on the fringe of the congregation found a new place in the community.

The processes that the various congregations described were more circular than linear. The conversations often began with the provincial council and widened to a designated steering committee. Effective steering committees attempted to involve as many as possible in the conversation through specific work groups, major assemblies or peer/regional gatherings. Involvement grew gradually and at members own interest and pace. Periodic straw ballots monitored member’s opinions and need for more information or contact.

Transition management began in the discernment process or early deliberations of restructuring but came into full play once the decision was made. Reconciling cultural practices and policies extended for years after the decision to merge. It became the primary task of leadership in the newly established province to build a new culture and organizational identity. When an agreed upon mission driven purpose, authentic leadership and inclusive engagement were elements of the process leading to a new felt trust the transition was less chaotic.



Mission-Driven Purpose

The origin of the restructuring process varied across the congregations. For some it was a call from a General Chapter to look at reorganization. For others it was the General Administration that was concerned with the number of province members, province finances or leadership potential. Others were initiated by province leadership into dialogue with other province leaders. For most this followed on an awareness of extensive province collaboration over the years in formation, elder care, retreats and cross-province placement of members in ministry. In one restructuring process it was the members themselves who pushed for the restructuring of their provinces. Each restructuring organization had to struggle with a compelling reason to enter into the restructuring process. For most the decision was a vote of all the members or at least a consultation by leadership. Members needed to be convinced that this was the right direction for the congregation and for them personally. Most engaged in a discernment process focused on how this action of reconfiguration would enhance or change their life for the better. Gathering to dialogue about the charism, how it could unfold into the future and what values needed to be maintained created a mission-driven purpose. Across province lines and experiences members could see what they held in common from the past and into the future. Ministry experiences were shared that cross-pollinated ideas in similar apostolates. Shared dreams for the future emerged with a sense that something new could happen. Some liken these experiences to a second novitiate experience.

Not all chose this path. Some focused on the pragmatic details of restructuring. Finances, properties, Presidium accreditation and leadership structures, among others, dominated their conversation. These topics created anxiety about inequalities and dissimilar practices resulting in negotiations for self-protection and setting conditions. These conversations did little to foster trust. In the absence of a shared vision for the future, self-preservation took over. This spirit continued until the final decision and after. The result was an ongoing suspicion of the other province(s), resulting in a sense of a takeover, rather than a restructuring. In the absence of a shared mission some focused on the shared past. Old memories, histories and perceptions returned to the forefront. Perceived ethnic prejudices, financial incompetence or theological ideology became the focus, yet they were never able to publicly explore these perceptions. Focusing on differences rather than commonalities, hurts rather than hopes, impacted the process and its results.

A focus on a future mission along with an awareness of province realities allowed some to re-imagine models and structures of leadership. Some of the groups recognized lay leadership as essential to their future and created structures to include professional and committed laity. Others reorganized their structures to represent a now-broadened geography or diversity of membership. Others created unique positions for the care of the elderly, apostolic renewal, vocations etc.. The restructuring process allowed for new structures that could more successfully lead the new province toward its shared mission-driven purpose, while not neglecting the needs of unique aspects and members of the province.

Authentic Leadership

Leadership played a pivotal role in the success of restructuring efforts. It was not always about how they led the process, but rather knowing when to come forth and when to get out of the way. All eight cases reported some conflict among leaders or between leadership

and members. In the successful restructuring efforts leadership addressed and managed the conflict. The opposite was also true. When the conflicts or differences were not addressed, the process became tedious, and new leadership is still trying to manage the conflict years after the restructuring. Conflict certainly arose around personalities, but also about differing philosophies or cultures, speed of the process, inequalities of finances or resources or size of membership, leadership models, perceived differing theologies or spiritualities, etc.

Authentic leadership did not let their own issues get in the way of what was best for their members. They continued the dialogue by using facilitators. They stepped away and empowered a restructuring manager or a restructuring steering committee to lead the process. One group realized that members perceived them as pushing restructuring. They empowered a respected steering committee composed of members from all the provinces to lead the process and create an attitude of discernment. One group used technology to make readily available all the information from working committees. This transparency created an open spirit of communication. Everyone knew what was going on.

In some cases provincial council members were opposed to restructuring. When the provincial engaged them in the process, members realized that all voices could be heard. When they were bypassed or ignored, these councilors sabotaged the process. Some groups reported that their greatest obstacles were past leaders. These latter sensed that their work over the years of building up their provinces was being ignored or diminished. They had difficulty letting go of their experience and opting for a new province. These men were well respected and their voices demanded to be heard. Allowing multiple forums to hear these voices put them in perspective and prevented them from becoming a pervasive negative influence.

Those congregations who were once a single province and had split had elderly men who knew each other from early formation days and younger men who were being formed in inter-provincial programs. It was the men in the middle who had less of a relationship with men in the other provinces. Authentic leadership identified the unique groupings of their members who needed attention during this change process and provided opportunities both to listen to and inform them. These groupings differed in their make-up: the elderly, younger members, the smaller provinces or those serving in foreign missions. Knowing the members and their concerns was pivotal to moving the process forward.

A primary task of leadership including the restructuring steering committee was communication. Besides knowing that there was a common mission and values, members were interested in the financial implications, projected demographics, mission priorities and of course pending litigation. More than the details, the members wanted to know if this would work on a practical level. Leadership used websites, newsletters and periodic reports at gatherings to inform members. Leadership educated members on the canonical restructuring issues (the specific requirements of their own constitutions) as well as the legal restructuring issues (bringing together corporations). The decision to restructure is a canonical issue first and foremost. The legal issues continue after the decision, and depending on the complexity of the organization's institutions, for an extended time.

Leadership that was authentic focused on the charism, mission and future of the congregation in the U.S. or North America. When they were derailed by province inequalities such as difference in stipends or budgeting they lost sight of their future. As religious men they were having the wrong conversation and suffered the results. For others, incorporating a bankrupt province was a non-issue: how else, they asked, would we keep our charism and presence in that part of the country?

Inclusive Engagement

All of the congregations studied held assemblies or retreats for all the members of the provinces during their restructuring processes. The only regret for some is that they should have had more assemblies. One congregation, whose members cited numerous success stories of the restructuring held four assemblies of the members over a six year period. These whole-group events put a face to what a new province could look like. Some felt the need for outside input at these events to broaden their perspective. Most valued the opportunity to meet and engage in substantive conversation with members of the other provinces. It was at these events that conversations about mission and future vision were articulated and celebrated. Some chose appreciative and positive-focused processes, which highlighted what gifts, resources, and attitudes each province was bringing to the new reality, not ignoring the differences in culture and practice, but put them into perspective. Others discussed cultural differences in humorous ways, assigning provocative metaphors to the various provinces, thereby addressing the differences but taking the fear out of them.

Ritual played an important role in these events. Elements of a common spirituality were highlighted through prayer and worship. Those interviewed still held mental images of processing to the cross or celebrating deceased members or jubilarians. For some it was the recognition through dialogic processes that the older and younger members valued the same things. A sense of pride and hope for the future were enkindled. These events lasted between three and five days. At some of the assemblies a straw vote was taken to poll the will of the members in the discernment to restructure. These votes were taken by standing, moving to a place along a continuum, or by secret ballot.

International Leadership played an important role in the assemblies. Members wanted to know the opinion of the General Superior or his delegate. The international perspective was informative and valued since all of the congregations were a part of a larger reality and their decision would impact the rest of the congregation. Many of the provinces sponsored missionary endeavors in other countries with finances and personnel. Some welcomed members from provinces in other parts of the world as part-time or full-time members. All these things had to be factored in to the consideration for restructuring.

Besides assemblies, many congregations developed other opportunities to involve members across province boundaries. Some chose to convene cross-province regional gatherings to prepare them for an assembly, or to continue the conversation after the assembly. Others gathered members in “under fifty” groups across provinces to hear the voices of the younger members. Particular ministry groups were gathered by yet other congregations to discuss the future of parish, retreat or other particular ministries. Most of the congregations had working committees on particular areas of the restructuring. Appropriate and informed members reviewed finances and properties; others looked at government models, community structures, ministry planning, communication, vocations and formation, and senior

members. Their primary task was to align policies and practices across provinces and suggest initial procedures for the new entity. All were approached as temporary, a living into a new model after the decision to restructure took place. Keeping policies flexible allowed for the changing realities of the organization and reassured the members that their lives were not going to change radically overnight.

Negotiating a time line for the restructuring process varied for each congregation. Some depended upon the date of the General Chapter, which alone was able to suspend and erect provinces. Others were geared to the readiness of the members, monitored by straw ballots and in accord with provincial chapters. For the cases interviewed the range was between 3 and 6 years. One of the cases made the decision quickly (one year) and empowered a temporary council to bring the provinces together over the next three years. For others an ongoing dialogue with general administration arrived at the appropriate time for a consultation for new provincial leadership and the appointment of the new administration. In the more successful cases there was a clear consensus among the members that it was time to make the decision to restructure. Members felt comfortable, knew members from the other provinces, had a sense of a future vision and most of all were trusting and hopeful.

Trust

A major insight that emerged from the research data was the role that trust played in the merger process. At every step of the process trust or the lack of trust was mentioned. It became clear that there was a correlation between the elements of the process and trust. Trust was defined as confidence, distrust as suspicion. Some defined trust as a willingness to be vulnerable in expectation of positive outcomes from others' behavior and responses. Essential to trust was the willingness to risk in expectation of some greater good. Past experiences contributed to the ability to trust. When there had been positive relationships, trust came easily. When past negative experiences were never broached and healed, suspicion continued.

In reviewing the data, positive and negative indications of trust were discovered at various stages of the merger process. In two of the cases trust was experienced throughout. This doesn't mean that there were not differences among members, but that the differences did not dominate or stop the process. In others it was experienced initially as a negative, but actions by authentic leadership or the inclusive engagement process were able to build trust. Leadership of three of the mergers all experienced or created conflict and confusion either among themselves or with members. Two of the organizational leaders solved the issue by getting out of the way. They either created another committee to steer the process or secured a project director to lead the process. In another organization the leaders did the opposite: they finally got involved and secured competent resources in a consultant and a better working committee. These interventions impacted the perceived results of the merger. They moved a mistrusting atmosphere to a more trusting one. In another case where trust was not present at any level of the merger process, the decision to move forward was made. The memory of the last assembly was of a shouting match of "What more do you want from us?" indicating a tremendous amount of frustration. In another case unarticulated concern about a theological perception and use of monies by one of the provinces led to a last minute stalemate that then had to be negotiated by the General Superior. Earlier conversations never allowed for the surfacing of these core suspicions. Building trust from the first conversations was important. Two provincials embarking on a restructuring process began by saying to each other, "There are no

non-negotiables for us in this process.” They were open to creating a new life together without holding back conditions or ministries. This trust permeated the process.

Renewal and Conversion

For those who experienced trust, it was often a result of a re-examination of their founding values and charism. They engaged in a re-founding of sorts where members asked the question, “What would the founder(s) do or want in this situation?” Retelling the founding stories for a new time facilitated a renewal, awareness that just as in the founding or expansion days of the congregation or provinces, restructuring challenges were operative. The challenge for this generation was to embrace the charism for a new context and environment and lead the congregation into the future, given the challenges of today.

Renewal happened among individual members. The consistent sharing of stories and building of relationships within the context of the charism created a new energy, camaraderie and vision. It did not happen for all, but when enough felt the spirit there was a change in the organization as a whole. Members began to imagine new ministries, in new locations with different constellations of members. They began to feel that they could create their future and not just be victims of a vocation crisis. Restructuring provided enough of a transition to disrupt the current equilibrium and jar members from their status quo. For some this freedom led to new life for themselves and their organizations.

The congregations that were interviewed cited various elements of renewal. Some felt they had clearer priorities and focus as a province. Even in their traditional ministries there was a new sense of how to be present differently. For those who had a significant number of lay members collaborating in their ministries there was an intensification and new respect for the mission ahead together. Many felt a renewed sense of hope for the future. Despite an increase in age and a diminishment in numbers there was a renewed conviction that they still had something significant to offer to the Church and the world. Certainly a streamlined administration and new governmental structures was a result. This often required more local member and community responsibility. Personnel and property resources were better utilized. With fewer in administration more personnel were available for external ministry. The integration of finance, development, health care and other offices across province boundaries freed up additional personnel and properties. Some recognized a greater acceptance of diversity among ethnic, age, philosophical and other categories. Provinces that had new ethnic members began to enjoy the possibilities they brought. Many were also intentional about creating new ministerial thrusts with new models of community in new geographic areas. This opened up the window for new possibilities among members.

Others reported that they could not wait until the process was finished and they could go back to normal. They attempted to isolate themselves as much as possible from change. One group reported that they had missed an opportunity to re-found themselves. They had restructured but had not used the opportunity to renew themselves. As a result these groups experience continual tension among members of the original provinces. Their new leadership reported that they felt they are leading multiple provinces under the guise of a new province.

Transition Issues

Entertaining a restructuring process puts an organization into a state of transition. Along with any transition are a letting go and the ability to walk in chaos on the journey toward a new beginning. Everyone is affected by this transition members and non-members alike. Issues of loss/grieving are triggered in even the most stalwart. Not only is the loss of province identity, leadership, sacred locations etc... stirred up but members unfinished personal losses and grieving is also surfaced. This can make for interesting meetings and dialogues. Some of the congregations have been intentional about grieving the transitions and change through ritual and conversation. Others have trained local superiors to become aware of transition issues that could emerge in their local communities. Powerful images of the Pascal mystery, wandering in the desert or founders own transition stories played a role in putting the transitions in a comforting spiritual context.

Transitions also provided unexpected opportunities. Members who were firmly planted in particular missions took the opportunity to retire. Some members who had been marginalized in provinces for all sorts of reasons found an opportunity to re-enter the new province and take up a different relationship. Others found it as a time of creativity and were excited about starting a new ministry with new people. Interestingly, not one of the congregations mentions losing members because of the restructuring. Some may have already been in the process of laicization and kept moving in that direction. No members left over the decision to restructure.

Transitions also impact others that are associated with the restructured provinces. Employees become concerned about their job security. Parishes become concerned about their staffing. Associates re-think their relationships to a new province entity. There is need to communicate with these and other populations that will be effected by the decision. They have the right to know the status of the discernment and projected timelines. Some of the groups have intentionally sought their council, helping them to imagine how they would fit into a new restructured province.

Other Observations

Peripheral to the research study were several observations that emerged, though they were not studied to any extent. One observation is that the Brother congregations approached the process differently than clerical (with brothers) congregations. Leadership was more egalitarian. They were committed to utilizing professional resources to facilitate the restructuring process. Their perceived outcomes were also self-described as more successful. Brother congregations also had more institutions to consider in the restructuring process. The focus on the preservation of their ministries into the future along with a strong commitment to community may have been factors that caused the change in approach and ensuing results. More research would be needed.

Only one of the congregations was engaged in a second restructuring. Having completed the process ten years earlier they were once again incorporating yet another province. It was difficult for them to return to a discussion of a mission-driven purpose. They had already claimed a direction for themselves and felt they could not go backwards. Many felt that this second restructuring process was stealing

energy from their mission. Their focus was primarily on the pragmatic issues of restructuring so as to get on with their life. The result of their success is yet to be determined.

Some of the provinces had been one province and split around forty years ago at a time of expansion. They had maintained significant relationships and collaborated in a variety of areas, especially in the last twenty years. Others were established from a European province and had created histories that stretched back over a hundred years with rich ethnic traditions and a ministerial presence since their founding. Those with a long-standing province identity seemed to have a more difficult time with restructuring conversations even with provinces that shared their charism. Cultural differences had a greater importance and concern despite many commonalities.

Are there alternatives to restructuring existing provinces into a new province? Some have explored the possibility of creating a federation that intensifies collaboration but maintains independent province leadership. When there are significant leadership talent and resources this does postpone the inevitable merger. Some question what is next after restructuring, especially if a renewal and re-founding has not happened. For international congregations the province model is giving way to greater inter-congregational organizing. Some are experimenting with regional configurations of government incorporating a variety of cultures and languages. General administrations are taking a more active role in the internal life of former provinces. Some congregations exist without provinces. They face a unique challenge of either collaborating with another congregation with a similar charism or risk going out of existence.

Whatever path is chosen, there is no bypassing the need to embrace renewal and manage the change that is inevitable in Religious life today. What seems to facilitate that change is a clear mission-driven purpose, leadership that leads authentically and inclusive engagement processes of members that build trust for the future.

Categories Compared Across the Eight Cases of Restructured Congregations

Congregations	A	B	C	D	E	F	G	H
Categories								
Context								
History of Interaction	Positive	Positive but limited	Positive at leadership level	Positive especially with co-workers	Formation	Positive long history	Positive at Leadership level	Limited
Size differential	One larger province of three	Equal size	Two larger provinces of four	One larger province of three	One slightly larger	Equal size	Two larger of the four	One larger
Initiation	Int'l Chapter (positive)	Int'l Leadership (distrustful)	Int'l Leadership (forceful)	Int'l Leadership (positive)	Members (positive)	Province Leadership (resistance)	Province Leadership (positive)	Int'l Leadership (forceful)

Purpose	For more effective ministry, diminishment, Canadian province bankrupt	Best effective use of resources (people, money, buildings) for the mission	Best way of mobilizing human resources for mission, diminishment	Insuring the future of the mission	An act of unity and an act of mission, reduction in numbers	Addressing our presence on the East coast and visioning for the future	Refounding (spiritual renewal) and restructuring (realignment of structures)	Disagreement in purpose between the two – diminishment or greater clarity of mission
Leadership	Collaborated with each other	Collaborated with each other	Too forceful then realigned	Confusion/action	Avoidance	Supportive/divisive	Collaborated with each other	Conflictual
Inter-provincial steering committee	Yes for various events	Yes	Yes as a tactic to enhance process	Yes with fulltime project director	Yes but was ineffectual	Yes, but was too forceful	Provincials were the committee	Councils were the committee until conflict
Facilitator	Yes	Yes	Yes	Internal	No then yes	Yes	Yes	For parts of the process (conflictual)

Congregations	A	B	C	D	E	F	G	H
Categories								
Engagement processes								
Assembly/retreat of all members	Yes – 4X	Yes – 1X	Yes – 1X	Yes – 2X	Yes – 3X	Yes – 1X	Yes – 1X	Yes – 3X
Fostered relationship building	Yes	Yes	Yes	Yes	Yes	Yes	No	No
Focused on structural/financial elements	No	No	No	Yes	Yes	Yes	Yes	Yes
Discussed vision	Yes	Yes	Yes	Yes	Yes	Yes	Yes (leadership's)	No

Appreciative processes	Yes	Yes	No	No	Yes	Yes	No	No
Communication mechanism	email	mail	mail	intranet	mail	mail	mail	none
Straw ballot	yes	yes	yes	yes	yes	yes	no	yes
Regional/age/interest groups	Yes	No	Yes	Yes	Yes	Yes	Yes	No
Utilized outside presenters	Yes	No	Yes	No	Yes	No	No	Yes
Invited laity to be part of the process	Yes	No	No	Yes	No	No	No	No
Description of trust	Growing trust built over six years	Growing trust modeled by leadership	Slowly grew through conversations especially the smaller groups concern about being absorbed by the larger	Used humor to minimize and appreciate differences	When signs of movement were visible trust increased towards leadership and each other	Despite the long term relationship there seemed to be suspicion	No opportunity to investigate trust among members, fear and possessiveness emerged later	Distrust among leaders and some members, wanted assurances

Congregations Categories	A	B	C	D	E	F	G	H
Unique aspects	Made the decision first and then worked out the details over time	Both provinces were initially in dialogue with other merger partners that did not move forward	Provincials were perceived as moving too fast	Dedicated project director who managed an intranet server for communication, Clear involvement with lay co-workers	Momentum began with the grassroots membership, a large number of foreign members work and reside in the	Provincials were driving the merger but not everyone was following, utilized a survey for feedback	It seems the provincials (and facilitator) were isolated from the concerns of the grassroots membership	One province had merged with another province six years earlier, lacked spiritual motivation for merging, corporate model

	states							
Descriptions of Results	Described as “unity, sense of direction, new relationships, restructured hearts”	Described as a sense of hope, possibilities for the future	Described as fantastic spirit, culture of vocations, energy and hope for the future	Described as new life and vitality, assurance that the mission will continue	Described as a greater awareness of inter-national and cross-cultural membership as well as reconciliation and hope	Articulated a common vision	They restructured, but with discontent among some, no renewal of spirit	They made the decision, but felt they had no other choice
Indications of renewal	“Something transformative had happened to them”	“a renewed sense of the charism and a revived sense of hope for the future”	“There is new energy, hope and a willingness to embrace the future yet unknown”	“new life and vitality”	“members have been reconciled and feel they have a new start”	“a focusing on the vision for our life and charism on the East coast”	“missed an opportunity”	“merger is not a time to renew community life and spirit”